

13th Annual

Maine

TAX FORUM

November 4 - 5, 2009
Augusta Civic Center

presented by:



Maine Revenue Services



**Internal
Revenue
Service**

Thomas
COLLEGE

Make your reservations early.
Seating is limited.

Who Should Attend?

Tax Professionals, Accountants, Enrolled Agents, CPAs, Tax Attorneys, Financial Planners and others who need to keep informed of changing and existing tax laws. CPE and CLE credits are available.

Location, Dates and Times

Augusta Civic Center

Wednesday, **November 4**, 8:30 am - 4:15 pm

Thursday, **November 5**, 8:15 am - 4:00 pm

Professional Education Credits

16 hours of CPE credits (including 1.75 hours of ethics)

or

12 hours of CLE credits (including 1.5 hours of ethics)

Fee

\$55 per day for each registrant, includes tuition, refreshments, lunch and Forum materials. Payments are nonrefundable after October 2, 2009.

For information, call or write:

Rose Jackson

(207) 626-8463

email:

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(207) 626-8478

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Heather.Colfer@maine.gov

Maine Revenue Services

P.O. Box 9100

Augusta, ME 04332-9100

November 4: Income Tax

7:45 REGISTRATION and COFFEE

8:30 Welcome

Hosts:

Dennis M. Doiron, Director
Income/Estate Tax Division
Maine Revenue Services

J. Peter Gilbert, CPA
Associate Professor of Accounting
Thomas College

Joseph M. Wynne, Area Manager
New England Small Business/Self Employed Division
Internal Revenue Service

8:45 Federal Income Tax Developments: Moderator - **Henry G. Rinker**, CPA, Baker Newman & Noyes, Portland, ME

Federal Business and Individual Income Tax Developments

Christine B. Worthen, Esq.
Eaton Peabody, Bangor, Maine

Robert B. Ravenelle, Esq.
Pierce Atwood LLP, Portland, Maine

Andrew Smith, CPA
Baker Newman & Noyes, Portland, Maine

M. Jean McDevitt, JD
Baker Newman & Noyes, Portland, Maine

Stephen A. Hutnak, CPA, MST
S.A. Hutnak & Assoc., LLC, Portland, ME

Jeffrey Ring, CPA
Berry Dunn McNeil & Parker, Portland, Maine

10:15 BREAK

10:35 Federal Income Tax Developments, continued

12:00 LUNCH

1:00 Maine Tax Developments

Estate Tax

Dennis J. O'Donovan, Esq.
Epstein & O'Donovan, LLP
Portland, Maine

Income Tax

Lee J. Chick, CPA
Berry Dunn McNeil & Parker
Bangor, Maine

2:30 BREAK

2:45 Ethics - Current Initiatives from the Office of Professional Responsibility (OPR)

This segment qualifies for
professional responsibility credit

To be presented by Spokesperson from
Internal Revenue Service, Office of Professional Responsibility

4:15 CLOSE

4:15 Thomas College Reception - Stop by for hors d'oeuvres, visit with tax product vendors, and network with your professional colleagues.

November 5 - Session I

7:45 **REGISTRATION and COFFEE**

8:15 **SESSION I OPTIONS** - Choose either Session I-A, Session I-B or Session I-C below

8:15 **Maine Pass-through Entity Filing Requirements and Compliance Activities**

I-A

Richard E. Truman, Tax Section Manager
Maine Revenue Services
Augusta, Maine

Elaine L. Corrow, CPA
Maine Revenue Services
Augusta, Maine

Louis H. Mandeville, CPA, MST
Maine Revenue Services
Augusta, Maine

8:15 **Investment Strategies/Retirement and Estate Planning**

I-B

Moderator - Wendy I. Bean, CPA, Manchester, Maine

Kristin Guibord, MBA, Sr. Investment
Manager & Personal Financial Advisor
BDMP Wealth Management
Portland, Maine

William Enck, CPA, CPC, APA
Senior Manager
Berry Dunn McNeil and Parker
Portland, Maine

Frank J. O'Shea, CPA/ABV, CVA
Principal
Berry Dunn McNeil and Parker
Portland, Maine

8:15 **Case Law Developments**

I-C

Elizabeth High, Esq.
LeBlanc & Young
Portland, Maine

Scott Boak, Assistant Attorney General
Attorney General's Office
Augusta, Maine

Christopher S. McLoon, Esq.
Verrill Dana LLP
Portland, Maine

10:00 **BREAK**

November 5 - Session II

10:20 SESSION II OPTIONS - Choose either Session II-A, Session II-B or Session II-C below

10:20 **Maine Department of Labor/Unemployment
Compensation - Employee Misclassification**

II-A

Jan McNitt, Assistant General Counsel
Maine Workers Compensation Board
Augusta, Maine

Laura A. Fortman, Commissioner
Maine Department of Labor
Augusta, Maine

Lloyd Black, Policy Development Specialist
Maine Department of Labor
Augusta, Maine

10:20 **Economic Developments - Maine Tax Incentives**

II-B

[Historic Preservation Credit](#)

Amy Cole Ives, Principal
Sutherland Conservation & Consulting
Hallowell, Maine

[Pine Tree Development Zones](#)

James Nimon, Senior Economic Advisor
Governor's Office
Augusta, Maine

10:20 **IRS Initiatives**

II-C

[Including Automated Underreporter Program Initiatives and the Similarities
Between AUR and Exam](#)

Shawn S. Savage, Sr. Stakeholder Liaison
Small Business/Self Employed Div.
Internal Revenue Service

Mary Hanson, Sr. Stakeholder Liaison
Small Business/Self Employed Div.
Internal Revenue Service

12:00 **LUNCH**

November 5 - General Session

AFTERNOON GENERAL ASSEMBLY

Main Auditorium

1:00 **Keynote Speaker**

2010 Program Priorities of the Small Business/Self-Employed Division

William P. Marshall, Director, Examination (North Atlantic Area)
Internal Revenue Service, Small Business/Self-Employed Division

2:15 **BREAK**

2:30 **Maine Tax Reform**

Michael J. Allen, Director
Research/Econometrics Division
Maine Revenue Services, Augusta, Maine

Peter B. Beaulieu, Director
Sales, Fuel and Special Tax Division
Maine Revenue Services, Augusta, Maine

Nelson A. Toner, Esq.
Bernstein, Shur, Sawyer & Nelson, PA
Portland, Maine

4:00 **CLOSE**

2009 MAINE TAX FORUM REGISTRATION FORM

You may also download a registration form at www.maine.gov/revenue

Reasonable accommodations will be made for attendees with disabilities. Please notify us as far in advance of the forum date as possible to request any special accommodations.

Last Name First Middle Initial

Email Address Agency/Company Name

Address

City State Zip Work Phone Number

☐ Contact information will be shared with tax product vendors attending the forum.
Check here if you do **not** want us to share your name, address or email information.

Please indicate the session(s) you plan to attend:

Day 1

Federal/State Tax
Developments

☐

Day 2 Breakout Sessions:

Session I
(choose one)

☐

I-A

☐

I-B

☐

I-C

Session II
(choose one)

☐

II-A

☐

II-B

☐

II-C

Afternoon General
Session

☐

Attendance Fee

☐

\$55.00 One day (per participant)

☐

\$110.00 Two day (per participant)

Professional Education Credits

☐

Check here if you would like a CPE certificate

☐

Check here if you would like a CLE certificate

Payment Information (check one box)

☐

Credit Card (circle one below)

☐

Check enclosed



MasterCard | VISA | Discover

Credit Card Account #: _____

Expiration Date: _____ Signature: _____

Registration and payment is due by October 2, 2009. Please make checks payable to: Treasurer, State of Maine. **Mail to: Maine Revenue Services, P.O. Box 9100, Augusta, ME 04332-9100.** For additional registrations, copy this form.

2009 Highlights

- ◆ A variety of tax product vendors will be on-site at this year's forum.
- ◆ Electronic filing of Sales Tax Returns

November 4

- ◆ **Reception hosted by Thomas College from 4:15pm - 6:00pm.** Please stop by for hors d'oeuvres, visit with tax product vendors, and network with your professional colleagues.
- ◆ **Ethics:** Internal Revenue Service Office of Professional Responsibility

November 5

- ◆ **Choice of 6 concurrent breakout sessions.**
- ◆ **Latest Initiatives from the Internal Revenue Service**
- ◆ **Keynote Speaker:**
William P. Marshall, Director, Examination (North Atlantic Area), Internal Revenue Service, Small Business/Self-Employed Division